Beckett, Steven K. (for Inland Counties Regional Center, Inc., Trustee)
Sixth Account and Report of Trustee, Petition for Approval of Trustee: Petition for Approval of Trustee Fees; and for Allowance of Attorney Fees and Costs

| | | INLAND COUNTIES REGIONAL CENTER, INC., | NEEDS/PROBLEMS/COMMENTS: |
|----------|---------------|--|--|
| | | Trustee, is Petitioner. | · |
| | | Account period: 3-1-13 through 2-28-14 | CONTINUED TO 7-28-14 |
| | | Accounting: \$187,603.43 | Per Attorney Request |
| | | Beginning POH: \$179,374.95 | |
| | Aff.Sub.Wit. | Ending POH: \$180,618.53 (cash) | 1. Petitioner requests costs |
| | Verified | Trustee: \$1,358.64 (0.75% paid during account | including \$19.95 for postage, which is considered by the |
| È | | period, per order 8-21-13) | Court to be a cost of doing |
| | Inventory | Attorney Steven K. Beckett: \$1,870.00 | business and not |
| - | PTC | (for 13.35 total attorney and paralegal hours, which includes estimated time for preparation | reimbursable pursuant to |
| <u> </u> | Not.Cred. | of the notice of hearing and appearance at | Local Rule 7.17. This amount |
| <u> </u> | Notice of Hrg | the hearing) | will be deducted from the |
| _ | Aff.Mail w | Costs: \$305.95 (for filing fee, courtcall, postage) | total costs. |
| | Aff.Pub. | Petitioner states the Court has denied | 2. Attorney fee request |
| | Sp.Ntc. | Petitioner the authority to allow Master Trust of | indicates that Petitioner |
| | Pers.Serv. | California to increase its trustee fees pursuant | estimated one hour for a total of \$100.00 to prepare |
| | Conf. Screen | to the new fee schedule dated 2-14-12. | the Notice of Hearing form, |
| | Letters | However, on another special needs trust, 04CEPR00105, the Court, in its order dated 8- | which as noted above |
| | Duties/Supp | 22-13, did authorize Petitioner to increase its | indicated an incorrect date. |
| | Objections | trustee fees to 1% of the funds held in the trust. | The Court may require |
| | Video | Honorable Judge Oliver advised Petitioner's | clarification regarding the |
| | Receipt | attorney to remind him that he had agreed to the increase when this case came up for | amount of time spent |
| | CI Report | hearing so that he could approve the increase | preparing this simple form. |
| | 9202 | on this case as well. Therefore, Petitioner | Note: The Court will set a status |
| ~ | Order | requests that it be authorized to take future | hearing for the filing of the next account as follows: |
| | | trustee fees in the amount of 1% of the funds held in the trust to be taken in quarterly | Monday, 6-22-15 <u>if a one-</u> |
| | | payments. | year account is required, OR |
| | | Petitioner prays for an order: | Monday, 6-20-16 if a two- |
| | | Settling, allowing and approving the | year account is required |
| | | account and report; | If the account has been filed, |
| | | 2. Ratifying, confirming and approving all acts | the above status hearing may be taken off calendar. |
| | | and transactions of trustee as set forth in | be lakeli oli calellaal. |
| | Aff. Posting | this account; | Reviewed by: skc |
| | Status Rpt | 3. Authorizing payment of the attorney's fees | Reviewed on: 6-25-14 |
| | UCCJEA | and costs; | Updates: |
| | Citation | 4. Approving payment of trustees fees during | Recommendation: |
| | FTB Notice | this account; | File 1 - Appleton |
| | | 5. Authorizing Petitioner to take future trustee | |
| | | fees in the amount of 1% of the funds held in the trust to be taken in quarterly | |
| | | payments; and | |
| | | Other relief that the Court considers proper. | |
| | | o. Other relief that the Court Considers proper. | |

2

Knudson, David N. (for Petitioner/Administrator Laura Dozier)

(1) First Account and Status Report of Administrator, and (2) to set Aside Exempt Personal Property

| | Personal Property | | | | | |
|----------|---------------------------------------|---|--|--|--|--|
| DC | D: 9/18/2007 | LAURA DOZIER, surviving | NEEDS/PROBLEMS/COMMENTS: | | | |
| | | spouse/Administrator, is petitioner. | | | | |
| | | | There have been 6 continuances in | | | |
| | | Account period: 2/4/2008 - 9/30/2013 | this matter. As of 6/26/14 the | | | |
| | l f 101110 | = | following issues remain: | | | |
| | ont. from 121113, | Accounting - \$650,755.95 | | | | |
| | 0314, 022414, 2414, 042114, | Beginning POH - \$650,750.00 | Petition does not allege any fact | | | |
| | 2414, 042114, 1914 | Ending POH - \$333,000.00 | as to why the personal property | | | |
| 03 | Aff.Sub.Wit. | | should be set aside for the | | | |
| | | Dalition or chalce of orthogonal and the ort | surviving spouse. | | | |
| ✓ | Verified | Petitioner states certain assets that | 2. Disbursement schedule does not | | | |
| _ | Inventory | were decedent's separate property constitute exempt personal property | include the nature and purpose | | | |
| <u> </u> | | eligible to be set aside to the surviving | of each disbursement as required | | | |
| ✓ | PTC | spouse pursuant to Probate Code | by Probate Code §1062(b). | | | |
| √ | Not.Cred. | §6510. Petitioner requests the court set | 2,1100010 0000 31002(0). | | | |
| <u> </u> | | aside the following personal property | 3. Petition states the Petitioner used | | | |
| ✓ | Notice of | with an aggregate value of \$10,250.00 | the proceeds from the sale of a | | | |
| | Hrg | 1997 Chevrolet pickup truck | bulldozer to reimburse herself | | | |
| ✓ | Aff.Mail W/ | • 2005 Honda ATV R1V32 | various administrative expenses. | | | |
| | Aff.Pub. | 2005 KTM Motorcycle | Need itemization. | | | |
| | | 1963 Willy Jeep | | | | |
| | Sp.Ntc. | Petitioner states as surviving spouse, | 4. Need order | | | |
| | Pers.Serv. | she is entitled to have the assets set | | | | |
| | Conf. | over to her. Petitioner has already | | | | |
| | Screen | taken possession of the assets and | Note: If the petition is granted the | | | |
| ✓ | Letters 2/4/08 | requests that her actions be ratified and confirmed. | court will set a status hearing for the | | | |
| | Duties/Supp | and commined. | filing of the petition for final distribution on Friday , September 26 , | | | |
| | Objections | Petitioner states the estate is not yet in | 2014 at 9:00 a.m. in Dept. 303. | | | |
| - | Video | a position to close. An action was filed | 2014 di 7.00 d.iii. iii Bepi. 000. | | | |
| | Receipt | on a rejected creditor's claim. The | Pursuant to Local Rule 7.5 if the | | | |
| | · · · · · · · · · · · · · · · · · · · | estate defaulted. The estate now is | required documents are filed 10 | | | |
| | CI Report | reviewing the situation to see whether | days prior the date set the status | | | |
| ✓ | 9202 | it is possible to file a motion to set aside | hearing will come off calendar and | | | |
| | Order X | the default. Petitioner believes it will | no appearance will be required. | | | |
| | | take an additional 4-6 months to close | | | | |
| | | the estate. | | | | |
| | Aff. Posting | | Reviewed by: KT | | | |
| | Status Rpt | Please see additional page | Reviewed on: 6/26/14 | | | |
| | UCCJEA | i lease see additional page | Updates: | | | |
| | Citation | | Recommendation: | | | |
| 1 | FTB Notice | | File 2 – Dozier | | | |
| L | | | | | | |
| | | | 2 | | | |

2 Sherman Wayne Dozier (Estate)

Case No. 08CEPR00017

Petitioner prays for an order:

- 1. That the First Account and Report of Petitioner be settled, allowed and approved as filed;
- 2. That all actions of Petitioner as Administrator, as set forth in the petition, account and report be ratified, confirmed and approved;
- 3. That the exempt personal property described in the petition be set aside to the surviving spouse;
- 4. That the administration of the estate continue.

Wright, Judith A. (for Wanda June Timmons – Executor/Petitioner)

(1) First and Final Report of Executor, (2) Petition for Final Distribution without an Accounting and for (3) Allowance of Compensation for ordinary Services

| DOD: 01/12/13 | WANDA TIMMONS, Executor, is Petitioner. | |
|-------------------------|--|------------------------------|
| 202101/12/10 | 27. 1. 27. 1. 1. 27. 1. 27. 27. 27. 27. 27. 27. 27. 27. 27. 27 | |
| | Accounting is waived. | |
| | | |
| Cont from | & A - \$616,692.57 | |
| Cont. from | POH - \$567,818.89 | |
| Aff.Sub.Wit. | (\$110,318.89 is cash) | |
| ✓ Verified | Executor - not addressed | |
| ✓ Inventory | - Horadaressed | |
| ✓ PTC | Attorney - \$14,911.87 | |
| ✓ Not.Cred. | (statutory) | |
| ✓ Notice of | | |
| Hrg | Closing - \$2,000.00 | |
| ✓ Aff.Mail w/o | 5 | |
| Aff.Pub. | Distribution, pursuant to decedent's will, is to: | |
| Sp.Ntc. | is io. | |
| Pers.Serv. | Andrew Bier - \$93,407.02 cash, | |
| Conf. | plus real property and a 2007 Hyundai | |
| Screen | vehicle | |
| Letters 03/21/13 | | |
| Duties/Supp | | |
| Objections | | |
| Video | | |
| Receipt | | |
| CI Report | | |
| √ 9202 | | |
| ✓ Order | | |
| Aff. Posting | | Reviewed by: JF |
| Status Rpt | | Reviewed on: 06/25/14 |
| UCCJEA | | Updates: |
| Citation | | Recommendation: SUBMITTED |
| ✓ FTB Notice | | File 3B - Bier |

Case No. 13CEPR00138

Christopher Antonio Navarro (GUARD/E)
Horton, Lisa (for Jennifer Sanchez – Guardian of the Estate) First Account and Report of Guardian

| | | | JENNIFER SANCHEZ, Maternal Aunt and | NEEDS/PROBLEMS/COMMENTS: |
|----------|--------------|---|--|--|
| | | | Guardian of the Estate without bond, is | |
| | | | Petitioner. | 1. Petitioner does not request |
| | | | | compensation for herself of for |
| | | | Account period: 3-26-13 through 3-26-14 | her attorney; however, there is |
| | Aff.Sub.Wit. | | Accounting: \$65,583.13 | no statement that they are waiving compensation for this |
| ~ | Verified | | Beginning POH: \$55,498.48 | account period. The Court may |
| | Inventory | | Ending POH: \$64,583.13 (All cash, held in blocked account) | require clarification. |
| | PTC | | (All Cast, field in blocked account) | |
| | Not.Cred. | | Guardian: No compensation requested | |
| | Notice of | | | |
| | Hrg | | Attorney: No compensation requested | |
| ~ | Aff.Mail | W | | |
| | Aff.Pub. | | Petitioner requests that the Court | |
| | Sp.Ntc. | | approve, allow and settle the account as filed and order such other relive as it | |
| | Pers.Serv. | | considers proper. | |
| | Conf. | | | |
| | Screen | | | |
| | Letters | | | |
| | Duties/Supp | | | |
| | Objections | | | |
| | Video | | | |
| | Receipt | | | |
| | CI Report | | | |
| ~ | 2620(c) | | | |
| ~ | Order | | | |
| | Aff. Posting | | | Reviewed by: skc |
| | Status Rpt | | | Reviewed on: 6-25-14 |
| | UCCJEA | | | Updates: |
| | Citation | | | Recommendation: |
| | FTB Notice | | | File 4 - Navarro |

Gloria Coyle (CONS/PE)

Marshall, Jared C. (for Co-Conservators Cynthia C. Thomas and Pamela J. Thomas)

Petition for Instructions Allowing Co-Conservators to Sign Deed in Lieu of
Foreclosure, or Alternatively, Allow Foreclosure Sale of Conservatee's Former Residence

| | | | CYNTHIA THOMAS and PAMELA THOMAS , Daughters and Co-Conservators with bond of \$65,709.60, are Petitioners. | NEEDS/PROBLEMS/ COMMENTS: |
|-------------|--|---|---|--|
| | Aff.Sub.Wit. | | Petitioners state the Conservatee purchased a residence with her late husband in 2007 for \$280,000.00: a first deed of trust was for \$224,000.00 and a second deed of trust was for \$56,000.00. The inventory value of the home as of 1-29-14 was \$195,000.00. | |
| > > | Verified Inventory PTC Not.Cred. Notice of | | Under the provisions of CCP §580b, the Conservatee cannot be personally liable to the lenders for deficiencies under either of the notes. Although the Conservatee and her husband made monthly payments, the payments were only applied to interest. | |
| > | Hrg Aff.Mail Aff.Pub. | W | The Conservatee resided in the home until January, 2014, when she moved in with her daughter, Co-Conservator Cynthia Thomas. | |
| | Sp.Ntc. Pers.Serv. Conf. | | The current principal balance outstanding on the first deed of trust is \$211,759.94, and the current principal balance outstanding on the second deed of trust \$52,574.87, for a total of \$264,334.81, which far exceeds | |
| | Screen Letters Duties/Supp | | the property's appraised value of \$195,000.00. Petitioners do not believe that renting the property is a viable option, as they would not be able to charge | |
| | Objections Video Receipt | | sufficient rent to cover expenses and reduce the principal balances. To further complicate matters, Petitioners state the Conservatee also acquired substantial credit card debt due to fraud prior to the initiation of conservatorship | |
| > | 9202 Order Aff. Posting | | proceedings. Petitioners have discussed the proposed deed in lieu of foreclosure and the Conservatee supports the | Reviewed by: skc |
| | Status Rpt UCCJEA | | foreclosure. Petitioners believe that a court order instructing them to sign a deed in lieu of foreclosure or alternatively to allow foreclosure of the property would benefit the conservatorship estate by extinguishing the | Reviewed by: SRC Reviewed on: 6- 25-14 Updates: |
| | Citation | | conservatorship estate's obligation under the anti- | Recommendation: |
| | FTB Notice | | deficiency statute set forth above and by saving and preserving the estate from an obligation of approx. \$264,334.81. | File 5 - Coyle |
| | | | Petitioners pray for an order: 1. Instructing the Co-Conservators to sign a deed in lieu of foreclosure, or in the alternative, authorizing the foreclosure as set forth in this petition; | |
| | | | Instructing the Co-Conservators to take such further actions and execute any and all documents as may be necessary to proceed with the deed in lieu of foreclosure, or in the alterantive, to proceed with the foreclosure; and | |
| | | | Grantign any and all other relief the Court deems just and proper. | |

6 Inez C. Sniffin (Det Succ)

Atty

Case No. 14CEPR00036

Esraelian, Robyn L. (for Dennis W. Sniffin, James L. Sniffen & Celeste M. Fisher – Petitioners)

Petition to Determine Succession to Real Property (Prob. C. 13151)

| DOD: 01/29/98 | | | DENNIS W. SNIFFIN, JAMES L. SNIFFEN, and CELESTE M. FISHER , children of the decedent, | NEEDS/PROBLEMS/COMMENTS: |
|---------------|-----------------------|--------|--|---|
| | | | are Petitioners. | CONTINUED FROM 03/27/14 |
| | | | 40 days since DOD. | As of 03/27/14, nothing further |
| | nt. from 02201 | 4, | No other proceedings. | has been filed in this matter. |
| | 0614, 032714, 0114 | | I & A - \$9,800.00 | There appears to be no provision in the Probate |
| y | Aff.Sub.Wit. | | Will dated 08/27/97 devises her estate equally | Code for Assignments in Summary Proceedings. |
| Ě | Inventory | | to her 4 children. | sommary rioecedings. |
| | PTC | | Son, Mark Sniffen, assigns his interest in the | |
| | Not.Cred. | | estate $\frac{1}{2}$ to Dennis Sniffen and $\frac{1}{2}$ to James Sniffen. | |
| √ | Notice of | | Detitioners request court determination that the | |
| | Hrg | | Petitioners request court determination that the decedent's 100% interest in mineral interests in | |
| ✓ | Aff.Mail | w/ | real property pass to them pursuant to | |
| | Aff.Pub. | | decedent's will and subject to the assignment of interest by Mark Sniffen. | |
| | Sp.Ntc. | | , | |
| | Pers.Serv. | | Declaration of Robyn L. Esraelian in Support of Petition to Determine Succession to Real | |
| | Conf. | | Property filed 06/23/14 states: this Petition was | |
| | Screen | l I | originally set for hearing on 02/20/14. The Court | |
| | Letters | | was not inclined to grant the Petition due to the nature of the Assignment of one of the | |
| | Duties/Supp | | beneficiary's interest in the property to be | |
| | Objections | l | distributed. County Counsel, being present in the courtroom, offered to have the matter | |
| | Video Receipt | | turned over to the Public Guardian, who had the authority to transfer the property per the | |
| | CI Report | | request in the Petition pursuant to CA Probate | |
| | 9202 | | Code § 7660(a)(2), without the need for the court to enter an order thereon. Declarant | |
| ✓ | Order | | states that she is still working with the Public | |
| | Aff. Posting | | Guardian and a further continuance will be | Reviewed by: JF |
| | Status Rpt | | needed to continue working on this matter with the Public Guardian. A 4 month continuance is | Reviewed on: 06/25/14 |
| | UCCJEA | | requested. | Updates: |
| _ | Citation | | | Recommendation: |
| | FTB Notice | | | File 6 – Sniffin |
| | | | | 6 |

Kruthers, Heather H (for Petitioner/Public Administrator)

Petition for Probate of Will and for Letters of Administration; Authorization to Administer Under IAEA (Prob. C. 8002, 10450)

| DC | D: 4/17/13 | | PUBLIC ADMINISTRATOR is petitioner | NEEDS/PROBLEMS/COMMENTS: |
|----------|--------------------|-----|---|---|
| | | | and requests appointment as | |
| | | | Administrator with Will Annexed. | Continued from 4/28/14. Minute |
| | | | - " | order states the court is advised that |
| Co | Cont. from 031214, | | Full IAEA - o.k. | an ancillary probate will need to be |
| | 042814 | | Will dated: 7/12/2004 | opened. |
| | Aff.Sub.Wit. | S/P | Will daled. 7/12/2004 | |
| ✓ | Verified | | Residence: North Carolina (leaving personal property and purported life | 1. Need original Will. |
| | Inventory | | insurance proceeds held by | |
| | PTC | | decedent's brother, in Clovis CA.) | Note: If the petition is granted, |
| | Not.Cred. | | · | status hearings will be set as follows: |
| | Notice of | | Publication: Fresno Business Journal | Wednesday, November 12, 2014 |
| | Hrg | | | at 9:00 a.m. in Department 303, |
| ✓ | Aff.Mail | W/ | Estimated value of the Estate: | for the filing of the inventory and |
| ✓ | Aff.Pub. | | Personal Property- \$250,000.00 <u>Real property</u> - \$150,000.00 | appraisal. |
| | Sp.Ntc. | | Total - \$400,000.00 | Wednesday, August 12, 2015 at |
| | Pers.Serv. | | ψ 100,000 | 9:00 a.m. in Department 303, for |
| | Conf. | | Probate Referee: Steven Diebert | the filing of the first account or petition for final distribution. |
| | Screen | | | permon for infair distribution. |
| ✓ | Letters | | | Pursuant to Local Rule 7.5 if the |
| | Duties/Supp | N/A | | required documents are filed 10 |
| | Objections | | | days prior the date set the status |
| | Video | | | hearing will come off calendar and |
| | Receipt | | | no appearance will be required. |
| | CI Report | | | |
| | 9202 | | | |
| √ | Order | | | |
| | Aff. Posting | | | Reviewed by: KT |
| | Status Rpt | | | Reviewed on: 5/26/14 |
| | UCCJEA | | | Updates: |
| | Citation | | | Recommendation: |
| | FTB Notice | | | File 7 – Higgins |
| | | | | 7 |

Atty Munsey, Lisa (pro per – daughter/Petitioner)

Atty Walters, Jennifer L. (Court Appointed for Conservator)

Amended Petition for Appointment of Probate Conservator of the Person and Estate (Prob. C. 1820, 1821, 2680-2682)

| Age: 70 | | | NO TEMPORARY REQUESTED | NEEDS/PROBLEMS/COMMENTS: | |
|----------|------------------|----|---|--|--|
| | | | LISA MUNSEY, daughter, is Petitioner | Court Investigator advised rights on 02/27/14. | |
| | | | and requests appointment as Conservator of the Person with | Voting rights affected, need minute order. | |
| Со | nt. from | | medical consent and dementia powers to administer dementia medications and for placement in | Note: If the petition is granted status hearings will be set as follows: | |
| | Aff.Sub.Wit. | | a secured perimeter facility and for | • Monday, 08/04/14 at 9:00a.m. in | |
| ✓ | Verified | | appointment of Conservator of the | Dept. 303 for the filing of the bond | |
| ✓ | Inventory | | Estate with bond set at \$61,580.20. | <u>and</u> • Monday, 07/20/15 at 9:00a.m. in | |
| | PTC | | Estimated Value of the Estate: | Dept. 303 for the filing of the first account. | |
| — | Not.Cred. | | Personal property -\$29,282.00 Annual income -\$26,700.00 | | |
| ľ | Notice of Hrg | | Total -\$55,982.00 | Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the | |
| √ | Aff.Mail | w/ | | hearings on the matter, the status hearing will come off calendar and no appearance will | |
| | Aff.Pub. | | Voting rights affected. | be required. | |
| | Sp.Ntc. | | | Note: Inventory & Appraisal, final was filed | |
| ✓ | Pers.Serv. | w/ | Petitioner states that the proposed conservatee has severe dementia | 03/20/14 | |
| ✓ | Conf. | | and is unable to speak her needs | | |
| | Screen | | or say when she is hungry. She must | | |
| ✓ | Letters | | be in a climate controlled area | | |
| ✓ | Duties/Supp | | due to having an allergy to cold. She requires assistance with all | | |
| | Objections | | activities of daily living and is | | |
| ✓ | Video | | unable to manage her financial | | |
| | Receipt | | resources or pay her bills on her | | |
| ✓ | CI Report | | own. | | |
| | 9202 | | Court Investigator Charlotte Bien | | |
| ✓ | Order | | filed a report on 03/05/14. | | |
| | Aff. Posting | | | Reviewed by: JF | |
| | Status Rpt | | | Reviewed on: 06/25/14 | |
| | UCCJEA | | | Updates: | |
| ✓ | Citation | | | Recommendation: | |
| | FTB Notice | | | File 8 - Munsey | |
| | | | | 0 | |

Glenn Kenneth Nilmeier Family Trust (Trust) Case No. 14CEPR00431

Chielpegian, Michael \$ Atty

Petition to Instruct Trustee Regarding Distribution of the Trust Estate

| Age: | | NEEDS/PROBLEMS/COMMENTS: |
|--------------|---|--------------------------|
| DOD: |] | |
| | | CONTINUED TO 7-30-14 |
| | | Per attorney request |
| Cont. from | 1 | |
| Aff.Sub.Wit. | | |
| Verified | | |
| Inventory | | |
| PTC | | |
| Not.Cred. | | |
| Notice of | | |
| Hrg | | |
| Aff.Mail | | |
| Aff.Pub. | | |
| Sp.Ntc. | | |
| Pers.Serv. | | |
| Conf. | | |
| Screen | | |
| Letters | | |
| Duties/Supp | | |
| Objections | | |
| Video | | |
| Receipt | | |
| CI Report | | |
| 9202 | _ | |
| Order | _ | |
| Aff. Posting | | Reviewed by: skc |
| Status Rpt | | Reviewed on: 6-25-14 |
| UCCJEA | | Updates: |
| Citation | | Recommendation: |
| FTB Notice | | File 9 - Nilmeier |

Garland, John F. (for Sarah Lopez Lopez – Executor)

Probate Status Hearing Re: Failure to File a First Account or Petition for Final Distribution

| DOD: 10/06/01 | SARAH LOPEZ LOPEZ was appointed Executor with full | NEEDS/PROBLEMS/ |
|--|--|--------------------------|
| | IAEA authority and without bond on 6/25/2002. | COMMENTS: |
| | | |
| | Letters issued 6/25/2002. | OFF CALENDAR |
| Cont. from 110813, | I & A filed on12/26/2002 showing the estate valued at | First and Final |
| 013114, 030314, | \$157,395.49. | Account filed |
| 042814 | ¥ · · · / · · · · · · · · | 06/26/14 and set |
| Aff.Sub.Wit. | First account or petition for final distribution was due | for hearing on |
| Verified | 6/25/2003. | 07/30/14 |
| | Status Report of Executor filed on 10/30/2013 states | 07/30/14 |
| Inventory | sometime in 2005, counsel's files for the estate were | |
| PTC | inadvertently placed in a box of closed files and taken | |
| Not.Cred. | to counsel's storage unit not located at counsel's | |
| Notice of Hrg | office. Counsel had no contact with the Executor after | |
| Aff.Mail | July 12, 2005. Counsel was unaware that the estate had not closed until he received the Notice of Status | |
| Aff.Pub. | Hearing from the Court. Counsel sincerely apologizes | |
| Sp.Ntc. | to the Court, the Executor and all interested parties for | |
| Pers.Serv. | his failure to complete his professional duties required to | |
| Conf. Screen | close the estate in a timely manner. | |
| Letters 06/25/02 | Counsel has met with Sarah Lopez Lopez regarding the | |
| Duties/Supp | status hearing and need to close the estate. Ms. Lopez | |
| Objections | believed the estate had been closed for several years. | |
| Video | Counsel has contacted the Law Offices of Joanne | |
| Receipt | Sanoian to assist him and the Executor in settling the | |
| CI Report | estate. Counsel anticipates the Final Account and | |
| 9202 | Report of Executor can be filed by January 15, 2014. | |
| Order | Clabus Depart of Everyther filed 01/00/14 states it has | |
| Aff. Posting | Status Report of Executor filed 01/28/14 states: it has been determined that additional documents are | Reviewed by: JF |
| Status Rpt | needed to complete an accounting and prepare the | Reviewed on: |
| | Petition for Final Distribution. Executor has looked | 06/25/14 |
| UCCJEA | through her files and found some things, but states that | Updates: 06/26/14 |
| Citation | several boxes of files believed to have contained the estate files, suffered water damage and were | Recommendation: |
| FTB Notice | discarded. The Executor has contacted Bank of | File 10 – Nelson |
| | America and requested copies of the estate bank | |
| | statements from June 2002 – December 2004 and was | |
| | informed that the statements were purged after 7 years | |
| | and were therefore unavailable. With the limited records available, Counsel has been able to prepare | |
| | an accounting, however, due to illnesses in Counsel's | |
| | family, he has not been able to complete the report of | |
| | the Executor. Counsel estimates that the report is 90% | |
| | complete and could be filed within 2 weeks requests a 4 week continuance, with the understanding that the | |
| | continued status hearing will come off calendar if the | |
| | Accounting is filed by then. | |
| | <u> </u> | |

Magness, Marcus D. (for Gloria L. McAfee – Executor)

Probate Status Hearing Re: Failure to File a Final Inventory and Appraisal and for Failure to File a First Account or Petition for Final Distribution

| | GLORIA L. MCAFEE, spouse, was appointed | NEEDS/PROBLEMS/COMMENTS: |
|--------------------|---|---|
| | Executor with full IAEA without bond on | |
| | 10/25/2006. | OFF Calendar. Petition to Close |
| | Letters issued on 10/25/2006. | Zero Estate and Discharge |
| Cont. from 030714, | Letters issued of 10/25/2000. | Executor filed 06/19/2014. |
| 051614 | Inventory and Appraisal was due on | Hearing set for 07/29/2014. |
| Aff.Sub.Wit. | 03/2007. | |
| Verified | | Minute Order of 03/07/2014 (Judge |
| Inventory | First Account or Petition for Final Distribution | Hamlin): No appearances. Counsel to |
| PTC | was due 12/2007. | file the required documents or a status |
| Not.Cred. | Notice of Status Hearing was mailed to | report before the next hearing. Failure to file said documents will result in the |
| Notice of | Marcus D. Magness on 12/20/2013. | issuance of an order to show cause |
| Hrg | _ | regarding contempt. Marcus Magness is |
| Aff.Mail | Former Status Hearing filed on 02/04/2014 | ordered to be personally present |
| Aff.Pub. | states prior to the decedent's death he filed a voluntary bankruptcy. After Decedent's | 05/16/2014. Based on a no asset estate, |
| Sp.Ntc. | death, the bankruptcy trustee fought to | the Court will waive the fees. |
| Pers.Serv. | retain jurisdiction over the Decedent's assets | Copy of Minute Order was mailed to |
| Conf. | and ultimately prevailed. Under the | Attorney Marcus D. Magness on |
| Screen | arrangement the bankruptcy court retained | 03/07/2014. |
| Letters | jurisdiction over all Decedent's assets until all | |
| Duties/Supp | creditors could be paid. Once this | |
| Objections | occurred, the remaining assets were to be transferred to the probate estate. | |
| Video | Transience to the probate estate. | |
| Receipt | The bankruptcy estate was ultimately closed | |
| CI Report | as a no asset estate. A true and correct | |
| 9202 | copy of the Trustee's Final Account and | |
| Order | Distributions Report Certification that the | |
| Aff. Posting | Estate has been Fully Administered and Application to be Discharged is attached as | Reviewed by: LV |
| Status Rpt | Exhibit 1. | Reviewed on: 06/25/2014 |
| UCCJEA | No assets were ever transferred to | Updates: |
| Citation | Decedent's probate estate | Recommendation: |
| FTB Notice | This matter should be dismissed as it is | File 11 – McAfee |
| | a no asset estate. | |
| | This office has not had contact with Ms. McAfee for years. Efforts to | |
| | contact her have been unsuccessful. | |
| | | II. |

Cross, Robert W M (for William R. Shockley and Katherine Royce – Co-Administrators)

Probate Status Hearing Re: Failure to File the Inventory and Appraisal and for Failure to File a First Account or Petition for Final Distribution

| | WILLIAM R. SHOCKLEY and KATHERINE ROYCE, | NEEDS/PROBLEM |
|--|---|--|
| | children, were appointed Co-Administrators with full IAEA without bond on 12/12/2006. Letters issued on 12/14/2006. | Minute Order of 0 Court will allow th document with a |
| Cont. from 030714, 051614 | Inventory and Appraisal was due on 05/2007. | Minute Order of 0 Hamlin): No appe |
| Aff.Sub.Wit. Verified Inventory PTC Not.Cred. Notice of | First Account or Petition for Final Distribution was due 02/2008. Notice of Status Hearing was mailed to Robert W M Cross on 12/18/2013. Former Status Report filed 05/14/2014 states that co- | to file the required status report before hearing. Failure to documents will result of an order to show regarding contered to be per 05/16/2014. |
| Aff.Mail Aff.Pub. | administrator or decedent's estate, Katherine Royce, died on 08/05/2011. Mr. Shockley, co-administrator, has promised to prove a copy of her death certificate. In this case, the sole significant asset was | Copy of Minute C Attorney Robert V 03/19/2014. |
| Sp.Ntc. Pers.Serv. Conf. | the residence real property commonly known as 2805 B Street, Ca. which was subject to a substantial note secured by the deed of trust on the property. At the | 1. Need Inven Appraisal a |
| Screen Letters Duties/Supp | time of appointment of the personal representatives it appeared that there was substantial equity in the home. It was listed for sale and a buyer was found for | or Petition for Distribution of status repor |
| Objections Video Receipt | a reasonable price. Unfortunately the buy backed out at the last minute. The value of the property then dropped because of the sharp decline of property values in general, no buyer was found at lower prices, | Local Rule 7 all matters s hearing veri |
| CI Report | and the property ultimately became worthless than the amount owed on notes secured by a deed of | must be filed days before |
| 9202 Order | trust. Co-administrator William R. Shockley made the house payments for about a year, but beyond that it was beyond his means, and his co-administrator sister lacked means to contribute significantly to continue payment on the real property. As a consequence the property was ultimately washed in foreclosure. The lender refused to deal with the co-administrators with regard to the property. As a consequence of the above, the remaining administrator, William R. | Status Repo with the app requirement status hearing a copy of the shall be servenecessary p |
| Aff. Posting | Shockley, has no assets to pay to any of the numerous creditors of decedent. Attorney Cross is requesting | Reviewed by: LV |
| Status Rpt UCCJEA Citation FTB Notice | that remaining co-administrator supply the attorney with the documentation concerning the foreclosure and his payments. Nothing remains, of course, to reimburse him either. | Reviewed on: 06 Updates: Recommendation File 12 – Shockle |

MS/COMMENTS:

05/16/2014: The he filing of the a Fee Waiver.

03/07/2014 (Judge pearances. Counsel ed documents or a ore the next to file said esult in the issuance now cause empt. Robert Cross ersonally present on

Order was mailed to W. Cross on

ntory and and First Account or Final or current written rt pursuant to 7.5 which states in set for status rified status reports ed no later than 10 e the hearing. orts must comply plicable code nts. Notice of the ing, together with he Status Report ved on all parties.

6/25/2014 ion: ley

Motsenbocker, Gary L. (for Mary S. Rodriguez – Executor)

Status Hearing Re: Filing of the First Account and/or Petition for Final Distribution

| DOD: 12/25/12 | MARY C PODDICHET daughter was | |
|-------------------|--|------------------------------|
| DOD: 12/25/12 | MARY S. RODRIGUEZ, daughter, was appointed Executor with full IAEA and | NEEDS/PROBLEMS/COMMENTS: |
| | without bond on 03/28/13. Letters | OFF CALENDAR |
| | Testamentary were issued on 03/29/13. | OFF CALENDAR |
| | 103141116111411 Wele 133064 611 00/27/10. | First & Final Account and |
| Cont. from 053014 | Inventory & Appraisal, final filed | Report of Executor was filed |
| Aff.Sub.Wit. | 05/08/13 - \$100,000.00 | 06/05/14 and is set for |
| Verified | | hearing on 07/10/14 |
| Inventory | | |
| PTC | | |
| Not.Cred. | | |
| Notice of | | |
| Hrg | | |
| Aff.Mail | | |
| Aff.Pub. | | |
| Sp.Ntc. | | |
| Pers.Serv. | | |
| Conf. | | |
| Screen | | |
| Letters | | |
| Duties/Supp | | |
| Objections | | |
| Video | | |
| Receipt | | |
| CI Report | | |
| 9202 | | |
| Order | | |
| Aff. Posting | | Reviewed by: JF |
| Status Rpt | | Reviewed on: 06/25/14 |
| UCCJEA | | Updates: |
| Citation | | Recommendation: |
| FTB Notice | | File 13 - Rodriguez |

William Shiba (Estate)

Motsenbocker, Gary L. (for William Martin (Marty) Shiba – Executor)

Status Hearing Re: Filing of the First Account and/or Petition for Final Distribution

| DOD: 07/04/12 | WILLIAM MARTIN (MARTY) SHIBA, son, | NEEDS/PROBLEMS/COMMENTS: |
|-------------------|--|------------------------------|
| | was appointed Executor with full IAEA | |
| | and without bond on 03/28/13. Letters | CONTINUED FROM 05/30/14 |
| | Testamentary were issued on 03/29/13. | |
| Cont. from 053014 | Inventory & Appraisal, final filed | |
| Aff.Sub.Wit. | 07/15/13 - \$68,775.68 | |
| Verified | | |
| Inventory | Status Report filed 06/20/14 states: The office is currently in the process of | |
| PTC | preparing the petition and first account | |
| Not.Cred. | current in this matter. Due to unforeseen | |
| Notice of | circumstances, the accounting is | |
| Hrg | currently still in the works. It is | |
| Aff.Mail | anticipated that it will be ready to be | |
| Aff.Pub. | filed within the next 30 days to allow time for the executor and his attorney | |
| Sp.Ntc. | to complete the first and account and | |
| Pers.Serv. | report. | |
| Conf. | ' | |
| Screen | | |
| Letters | | |
| Duties/Supp | | |
| Objections | | |
| Video | | |
| Receipt | | |
| CI Report | | |
| 9202 | | |
| Order | | |
| Aff. Posting | | Reviewed by: JF |
| Status Rpt | | Reviewed on: 06/25/14 |
| UCCJEA | | Updates: |
| Citation | | Recommendation: |
| FTB Notice | | File 14 - Shiba |

15

Robert H. Edmonds (Estate)
Roberts, Gregory J. (for Executor Robert Lee Adams) Atty Status Hearing Re: Filing of the Bond

| DOD: 6/20/2013 | ROBERT LEE ADAMS was appointed Executor with full IAEA authority and | NEEDS/PROBLEMS/COMMENTS: |
|-------------------|--|-------------------------------|
| | bond set at \$130,000.00. | |
| | ' ' | OFF CALENDAR. Bond filed on |
| Comb from 051/14 | Minute Order dated 4/16/14 set this | 5/20/14 and Letters issued. |
| Cont. from 051614 | status hearing for the filing of the bond | |
| Aff.Sub.Wit. | and issuance of Letters. | |
| Verified | | |
| Inventory | | |
| PTC | | |
| Not.Cred. | | |
| Notice of | | |
| Hrg | | |
| Aff.Mail | | |
| Aff.Pub. | | |
| Sp.Ntc. | | |
| Pers.Serv. | | |
| Conf. | | |
| Screen | | |
| Letters | | |
| Duties/Supp | | |
| Objections | | |
| Video | | |
| Receipt | | |
| CI Report | - | |
| 9202 | 1 | |
| Order | 1 | Pavious d by KT |
| Aff. Posting | 4 | Reviewed by: KT |
| Status Rpt UCCJEA | 4 | Reviewed on: 6/25/14 Updates: |
| Citation | | Recommendation: |
| FTB Notice | | File 15 - Edmonds |
| FIB NOTICE | | riie 15 - tamonas |

16 Gabriel Garcia and Isaiah Garcia

Case No. 10CEPR00371

Atty Holguin, Mary A. (Pro Per – Paternal Grandmother of ____ - Petitioner)

Atty Olivas, Yolanda (Pro Per – Maternal Grandmother – Guadian)

Petition for Visitation

| Ga | Gabriel age: 5 years M | | MARY A. HOLGUIN, Paternal | NEEDS/PROBLEMS/COMMENTS: | |
|----------|-------------------------|---|--|--------------------------|--|
| Isa | iah age: 4 Years | 3 | Grandmother of Gabriel and Isaiah, is Petitioner. | 1. | Need Notice of Hearing. |
| | | | YOLANDA OLIVAS, Maternal Grandmother, was appointed Guardian of these minors and their half- siblings on 2-22-11. | 2. | Need proof of service of Notice of Hearing at least 15 days prior to the hearing on the Guardian, Yolanda Olivas. |
| <u> </u> | Aff.Sub.Wit. | | Father: Gabriel Garcia | _ | The Count many rules as suite metion |
| Ľ | Verified | | Mother: Esperanza Diaz | 3. | The Court may also require notice to the other family members, |
| | Inventory | | Monton Esporanza Biaz | | including the parents and siblings |
| | PTC | | Petitioner states she would like to visit | | if age 12 or older. |
| | Not.Cred. | Х | with her grandchildren Gabriel and | | |
| | Notice of Hrg Aff.Mail | X | Isaiah Garcia. She would like to know | | |
| | Aff.Pub. | | them, see them, visit with them. She | | |
| | Sp.Ntc. | | wants them to know her side of the family. | | |
| | Pers.Serv. | | Tarrilly. | | |
| | Conf. Screen | | | | |
| | Letters | | | | |
| | Duties/Supp | | | | |
| | Objections Objections | | | | |
| | Video | | | | |
| | Receipt | | | | |
| | CI Report | | | | |
| | 9202 | | | | |
| | Order | Χ | | | |
| | Aff. Posting | | | Re | viewed by: skc |
| | Status Rpt | | | Re | viewed on: 6-25-14 |
| | UCCJEA | | | Up | dates: |
| | Citation | | | Re | commendation: |
| | FTB Notice | | | II | e 16 – Diaz, Alvarez, Lopez & |
| | | | | Go | arcia |

Pro Per Okamura, Suzanne (Pro Per Administrator)

Status Hearing Re: Filing of the Inventory and Appraisal

| Sidios flediling ke. Filling of the inventory drid Approximation | | | | | |
|--|-----------------|----|--|--|--|
| DOD: 6/6/2013 | | | SUZANNE OKAMURA , sister, was appointed | NEEDS/PROBLEMS/COMMENTS: | |
| | | | Administrator with Limited IAEA without bond 10/3/2013. | <u>Page 18</u> is the related Estate of Ito Okamura. | |
| | ont. from 03071 | 4, | Letters issued on 10/14/2013. | Continued from 5/16/2014. Minute Order | |
| 05 | 1614 | | | states: No appearances. Matter | |
| | Aff.Sub.Wit. | | Pursuant to Probate Code § 8800(b), Final Inventory and Appraisal was due 2/14/2014. | continued to 6/30/2014. The Court orders Suzanne Okamura to be personally | |
| | Verified | | ee., ee., q.,o. eeeee e.ee 2, 1 1, 20 11 | present on 6/30/2014 if the inventory and | |
| | Inventory | Χ | Minute Order dated 10/3/2013 from the | appraisal has not been filed. | |
| | PTC | | hearing on the Amended Petition for letters of administration set the matter for a Status | Clerk's Certificate of Mailing filed | |
| | Not.Cred. | | Hearing for filing of the final inventory and | 5/16/2014 shows a copy of the Minute | |
| | Notice of | | appraisal on 3/7/2014. | Order dated 5/16/2014 was mailed to Suzanne Okamura on 5/16/2014. | |
| | Hrg | | Minute Order dated 2/7/0014 [history Heaville] | 302011116 OKUITIOIU 011 3/10/2014. | |
| | Aff.Mail | | Minute Order dated 3/7/2014 [Judge Hamlin] from the Status Hearing for filing of the | The following issues remain: | |
| | Aff.Pub. | | Inventory and Appraisal states: No | Need Final Inventory and Appraisal | |
| | Sp.Ntc. | | appearances. The Court orders that the | pursuant to Probate Code § 8800(b), or verified status report and proof of | |
| | Pers.Serv. | | assets not be wasted until the final inventory and appraisal has been filed and the | service of notice of the status hearing | |
| | Conf. | | creditors have been paid. The Court directs | pursuant to Local Rule 7.5(B). | |
| | Screen | | that a copy of the examiner notes be sent to | | |
| | Letters | | Suzanne Okamura. The Court will expect the | | |
| | Duties/Supp | | inventory and appraisal, or a status report to be filed before the next hearing. Failure to file | | |
| | Objections | | said document(s) will result in the issuance of | | |
| | Video | | an order to show cause regarding contempt. | | |
| | Receipt | | Matter continued to 5/16/2014. Suzanne | | |
| | CI Report | | Okamura is ordered to be personally present on 5/16/2014. | | |
| | 9202 | | , - , - · · · | | |
| | Order | | Clerks' Certificate of Mailing filed 3/7/2014 | | |
| | Aff. Posting | | shows a copy of the Minute Order dated 3/7/2014 and Examiner Notes were mailed to | Reviewed by: LEG | |
| | Status Rpt | Χ | Suzanne Okamura on 3/7/2014. | Reviewed on: 6/25/14 | |
| | UCCJEA | | 37,723111 | Updates: | |
| | Citation | | | Recommendation: | |
| <u>L</u> | FTB Notice | | | File 17 – Okamura | |
| | | | | 17 | |

Pro Per

Okamura, Suzanne (Pro Per Executor)

Status Hearing Re: Filing of the Inventory and Appraisal

| DOD: 6/23/2013 | | SUZANNE OKAMURA, daughter, was | NEEDS/PROBLEMS/COMMENTS: |
|----------------|---------------------------|---|--|
| | | appointed Executor with Limited IAEA authority without bond on 10/3/2013. | <u>Page 17</u> is the related Estate of Daniel Kazuo Okamura. |
| | | = Letters issued on 10/14/2013. | Continued from 5/16/2014. Minute Order |
| | ont. from 030714, 1614 | Final Inventory and Appraisal was filed on | states: No appearances. Matter continued to 6/30/2014. The Court orders Suzanne Okamura to be personally |
| | Aff.Sub.Wit. | 9/18/2013 showing an estate consisting of cash and life insurance proceeds valued at | present on 6/30/2014 if the inventory and |
| | Verified | \$383,670.00. | appraisal has not been filed. |
| ✓ | Inventory | Minute Order dated 10/3/2013 from the | Clerk's Certificate of Mailing filed 5/16/2014 shows a copy of the Minute |
| | PTC | hearing on the Amended Petition for letters | Order dated 5/16/2014 was mailed to |
| | Not.Cred. | of administration set the matter for a Status Hearing for filing of the final inventory and | Suzanne Okamura on 5/16/2014. |
| | Notice of | appraisal on 3/7/2014. | |
| | Hrg | = | |
| | Aff.Mail | Minute Order dated 3/7/2014 [Judge Hamlin] from the Status Hearing for filing of | |
| | Aff.Pub. | the Inventory and Appraisal states: No | |
| | Sp.Ntc. | appearances. The Court orders that the | |
| | Pers.Serv. | assets not be wasted until the final inventory | |
| | Conf. | and appraisal has been filed and the creditors have been paid. The Court directs | |
| | Screen | that a copy of the examiner notes be sent | |
| | Letters | to Suzanne Okamura. The Court will expect | |
| | Duties/Supp | the inventory and appraisal, or a status | |
| | Objections | report to be filed before the next hearing. Failure to file said document(s) will result in | |
| | Video | the issuance of an order to show cause | |
| | Receipt | regarding contempt. Matter continued to | |
| | CI Report | 5/16/2014. Suzanne Okamura is ordered to be personally present on 5/16/2014. | |
| | 9202 | De personally present on 3/10/2014. | |
| | Order | Clerks' Certificate of Mailing filed 3/7/2014 | |
| | Aff. Posting | shows a copy of the Minute Order dated | Reviewed by: LEG |
| | Status Rpt | 3/7/2014 and Examiner Notes were mailed to Suzanne Okamura on 3/7/2014. | Reviewed on: 6/25/14 |
| | UCCJEA | 10 302011116 OKUITIOIA 011 3///2014. | Updates: |
| | Citation | _ | Recommendation: |
| | FTB Notice | | File 18 – Okamura |
| | | | 10 |

Coleman, Tierra Anabel (Pro Per – Petitioner – Paternal Aunt)

Petition for Appointment of Guardian of the Person (Prob. C. 1510)

| Ag | e: 4 | NO TEMPORARY REQUESTED |
|----------|------------------|---|
| | | TIERRA ANABEL COLEMAN, paternal |
| | | Aunt, is petitioner. |
| | 1.5 05011 | Father: KYLE ALBERT COLEMAN |
| Co | nt. from 050114 | |
| | Aff.Sub.Wit. | Mother: ALEXIS OROSCO , Declaration of Due Diligence filed 02/21/2014 |
| ✓ | Verified | |
| | Inventory | Paternal Grandfather: Terry Coleman, Consents and Waives Notice |
| | PTC | Paternal Grandmother: Rosemary Smith, Consents |
| | Not.Cred. | and Waives Notice |
| | Notice of Hrg | X Maternal Grandfather: Unknown |
| | Aff.Mail | Maternal Grandmother: Jamie Briones |
| | Aff.Pub. | Petitioner states: that the child was in her care as of |
| | Sp.Ntc. | 11/2011 when the mother dropped the child off with the petitioner. The mother left the child and would not |
| | Pers.Serv. | x contact the petitioner or the child for days or weeks at |
| √ | Conf. | a time. Both mother and father were hard to locate. |
| | Screen | For the first two years of the minor's life the petitioner |
| ✓ | Letters | cared for the child and provided for all his needs. Petitioner states that the child's home is with her and |
| ✓ | Duties/Supp | his grandparents. The child is currently residing with the father however the petitioner is worried about the |
| | Objections | care of the minor. She states the last time the child |
| | Video | was in her care was 08/2012. |
| | Receipt | Petitioner requests that notice be waived to the |
| ✓ | CI Report | mother and the father as she has been subjected to verbal attacks and threats of never seeing the child |
| | 9202 | again. |
| ✓ | Order | Letter from Father, Kyle Albert Coleman, filed 05/01/2014 states he could not make the Court date |
| | | due to work. He states his job provides for him and his child and he did not want to put his job in jeopardy. |
| | | He states he works 8 hours a day Monday through |
| | Aff. Posting | Friday and sometimes on Saturday when needed. He states only Mondays are available for a Court date. |
| | Status Rpt | |
| ✓ | UCCJEA | Court Investigator Samantha Henson's report filed 04/25/2014. |
| | Citation | Court Investigator Samantha Henson's supplemental |
| | FTB Notice | report filed 06/17/2014. |

NEEDS/PROBLEMS/COMMENTS:

Minute Order of 05/01/2014 (Judge Chittick): Ms. Ambriz is appearing on behalf of the father who is unable to be present. A letter from the Father is submitted to the Court and accepted. Parties are ordered to provide their contact information to the Clerk's Office.

- 1. Need Notice of Hearing.
- Need proof of personal service fifteen (15) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Appointment of Guardian or consent and waiver of notice or declaration of due diligence for:
 - Kyle Coleman (Father) Unless the Court waives notice
 - Alexis Orosco (Mother) Unless the Court waives notices
- Need proof of service fifteen
 (15) days prior to the hearing of
 the Notice of Hearing along with
 a copy of the Petition for
 Appointment of Guardian or
 consent and waiver of notice or
 declaration of due diligence for:
 - Maternal Grandfather (Unknown)
 - Jamie Briones (Maternal Grandmother)

Reviewed by: LV

Reviewed on: 06/26/2014

Updates:

Recommendation:

File 19 - Coleman

Duran, Consuelo (pro per Petitioner/maternal grandmother)

Petition for Appointment of Guardian of the Person (Prob. C. 1510)

| Age: 7 years | TEMPORARY EXPIRES ON 6/30/14 | NEEDS/PROBLEMS/COMMENTS: |
|---|---|--|
| Cont. from 051514 Aff.Sub.Wit. Verified Inventory PTC Not.Cred. Notice of Hrg Aff.Mail X Aff.Pub. Sp.Ntc. Pers.Serv. X Conf. Screen Letters Duties/Supp Objections Video Receipt CI Report 9202 Order Aff. Posting Status Rpt UCCJEA | CONSUELO DURAN, maternal grandmother, is petitioner. Father: ISMAEL GARCIA – consents and waives notice. Mother: AMYE CONSUELO RODARTE Paternal grandparents: Unknown Maternal grandfather: Antonio Rodarte Petitioner states she has been in the life of her grandson since birth. He has been residing with her since December. The minor has autism and Petitioner states she has the patience to meet his needs. Court Investigator Jennifer Young's Report filed on 6/24/14. DSS Social Worker Irma Ramirez's Report filed on 6/24/14. | Need proof of personal service of the Notice of Hearing along with a copy of the Petition or Consent and Waiver of Notice or Declaration of Due Diligence on: Amye Consuelo Rodarte (mother) Need proof of service of the Notice of Hearing along with a copy of the Petition or Consent and Waiver of Notice or Declaration of Due Diligence on: Paternal grandparents Antonio Rodarte – served by mail on 5/13/14 for the 5/15/14 hearing, 1 day notice and not the required 15 days. Reviewed by: KT Reviewed on: 6/26/14 Updates: |
| Citation FTB Notice | | Recommendation: File 20 - Rodarte |
| LIR NOTICE | | riie 20 - koaarre |

21 Eric Gutierrez, Cerina Gutierrez & Gregory Gutierrez (GUARD/P)

Case No. 14CEPR00382

Atty Vidal, Lydia (pro per – maternal grandmother/Petitioner)

Petition for Appointment of Guardian of the Person (Prob. C. 1510)

| TEMPORARY DENIED ON 05/12/14 LYDIA VIDAL, maternal grandmother, is Petitioner. Petitioner. Cont. from Aff.Sub.Wit. Verified Inventory PTC Not.Cred. Notice of Aff.Nabi Aff.Nabi Aff.Nabi Aff.Nab. Sp.Ntc. Pers.Serv. V Conf. Screen Video Receipt Objections Video Receipt LYDIA VIDAL, maternal grandmother, is Petitioner. 1. Need Notice of Hearing. 1. Need Notice of Service at least I days before the hearing of Not of Hearing with a copy of the Petition for Appointment of Guardian of the Person or Consent & Waiver of Notice or Declaration of Due Diligence for a. Eileen Rocha (mother) – personal service required b. Gabriel Gutierrez (minor) – personal service required d. Cerina Gutierrez (minor) – personal service required d. Cerina Gutierrez (minor) – personal service prequired e. Paternal grandparents – service by mail sufficient f. Maternal grandfather – service by mail suffici | Eric | c, 15 | | NO TEMPORARY IN PLACE; | NEEDS/PROBLEMS/COMMENTS: |
|--|--------------|--------------|----------|--|---------------------------------------|
| LYDIA VIDAL, maternal grandmother, is Petitioner. Petitioner. Father: GABRIEL GUTIERREZ Mother: EILEEN ROCHA Mother: EILEEN ROCHA Mother: Bitteen Rocha Mother: Maternal grandparents: NOT LISTED Inventory PTC Not.Cred. Notice of X Hrg Aff.Nail X Aff.Pub. Sp.Ntc. Pers.Serv. X Conf. Screen Video Receipt Rother: GABRIEL GUTIERREZ 2. Need proof of service at least in days before the hearing of Not of Hearing with a copy of the Petition for Appointment of Guardian of the Person or Consent & Waiver of Notice or Declaration of Due Diligence for a. Eileen Rocha (mother) – personal service required b. Gabriel Gutierrez (father) – personal service required c. Eric Gutierrez (minor) – personal service required d. Cerina Gutierrez (minor) – personal service required font have not been attending school and do not have sufficient clothes. Court Investigator Jennifer Young filed a report on 06/24/14. | | | | TEMPORARY DENIED ON 05/12/14 | |
| Petitioner. | Ce | rina, 13 | | LVDIA VIDAL | 1. Need Notice of Hearing. |
| Tather: GABRIEL GUTIERREZ Cont. from | | | | 9 | 2. Need proof of service at least 15 |
| Father: GABRIEL GUTIERREZ Mother: EILEEN ROCHA Mother: EILEEN ROCHA Mother: EILEEN ROCHA Paternal grandparents: NOT LISTED Inventory PTC Not.Cred. Notice of | Gre | egory, 10 | | reillioner. | |
| Cont. from Aff.Sub.Wit. ✓ Verified Inventory PTC Not.Cred. Notice of Hrg Aff.Pub. Sp.Ntc. Pers.Serv. ✓ Conf. Screen ✓ Duties/Supp Mother: EILEEN ROCHA Mother: EILEEN ROCHA Mother: EILEEN ROCHA Mother: EILEEN ROCHA Paternal grandparents: NOT LISTED Maternal grandfather: NOT LISTED Petitioner states the children lived with her for 9 years up until 04/22/14 when the mother removed them from her home. Petitioner states that since residing with their mother, the children have not been attending school and do not have sufficient clothes. Court Investigator Jennifer Young filed a report on 06/24/14. Petition for Appointment of Guardian of the Person or Consent & Waiver of Notice or Declaration of Due Diligence for a. Eileen Rocha (mother) — personal service required b. Gabriel Gutierrez (father) — personal service required d. Cerina Gutierrez (minor) — personal service personal service personal service required d. Cerina Gutierrez (minor) — personal se | | | | Father: GABRIEL GUTIERREZ | · · · · · · · · · · · · · · · · · · · |
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| Inventory | | Aff.Sub.Wit. | | | <u> </u> |
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| Notice of X Hrg | | Inventory | | Maternal grandfather: NOT LISTED | · · · · · · · · · · · · · · · · · · · |
| Notice of X Hrg | | PTC | | Maioriai gianaiainei. NOI LISTED | · · · · · · · · · · · · · · · · · · · |
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| Aff.Mail x Aff.Pub. Sp.Ntc. Pers.Serv. x ✓ Conf. Screen ✓ Letters ✓ Duties/Supp Objections Video Receipt home. Petitioner states that since residing with their mother, the children have not been attending school and do not have sufficient clothes. Cerina Gutierrez (minor) – personal service required e. Paternal grandparents – service by mail sufficient f. Maternal grandfather – service by mail sufficient service by mail sufficient | | Notice of | Х | her for 9 years up until 04/22/14 when | c. Eric Gutierrez (minor) – |
| Aff.Pub. Sp.Ntc. Pers.Serv. x ✓ Conf. Screen ✓ Letters ✓ Duties/Supp Objections Video Receipt Residing with their mother, the children have not been attending school and do not have sufficient clothes. Paternal grandparents – service by mail sufficient f. Maternal grandfather – service | | | | | · · · · · · · · · · · · · · · · · · · |
| Sp.Ntc. have not been attending school and do not have sufficient clothes. | | Aff.Mail | Х | | · · · · · · · · · · · · · · · · · · · |
| Sp.Nfc. do not have sufficient clothes. Service by mail sufficient | | Aff.Pub. | | 9 | |
| Pers.Serv. x ✓ Conf. Screen ✓ Letters ✓ Duties/Supp Objections Video Receipt Receipt F. Maternal grandfather – service by mail sufficient | | Sp.Ntc. | | _ | , · |
| ✓ Conf. Screen ✓ Letters ✓ Duties/Supp Video Receipt Court Investigator Jennifer Young filed a report on 06/24/14. Service by mail sufficient service by mail sufficient report on 06/24/14. | | Pers.Serv. | Х | de ner nave semelem elemes. | • |
| ✓ Letters ✓ Duties/Supp Objections Video Receipt | ✓ | Conf. | | Court Investigator Jennifer Young filed a | |
| ✓ Duties/Supp Objections Video Receipt | | Screen | | report on 06/24/14. | |
| Objections Video Receipt | ✓ | Letters | | | |
| Video Receipt | \checkmark | Duties/Supp | | | |
| Receipt | | Objections | | | |
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| | ✓ | CI Report | | | |
| 9202 | | | <u> </u> | | |
| ✓ Order | ✓ | | | | |
| Aff. Posting Reviewed by: JF | | • | <u> </u> | | |
| Status Rpt Reviewed on: 06/25/14 | | | | | |
| V UCCJEA Updates: | √ | | <u> </u> | | |
| Citation Recommendation: | | | <u> </u> | | |
| FTB Notice File 21 - Gutierrez | | FIB Notice | | | File 21 - Gutierrez |

Petition for Appointment of Guardian of the Person (Prob. C. 1510)

| Petition for Appointment of Guardian of the Person (Prob. C. 1510) | | | | |
|--|--|--|--|--|
| Aysia, 2 | TEMPORARY EXPIRES 06/30/14 | NEEDS/PROBLEMS/COMMENTS: | | |
| Jerome, 10 mos. | GINA WALKER, paternal grandmother, is Petitioner. | Need Notice of Hearing. Need proof of service at least 15 | | |
| Cont. from | Father: JEROME DIXON – deceased | days before the hearing of Notice of Hearing with a copy of the | | |
| Aff.Sub.Wit. | Mother: CIDNEY TAYLOR – Declaration | Petition for Appointment of | | |
| | of Due Diligence filed on 4/30/14 | Guardian of the Person <u>or</u> Consent & Waiver of Notice or | | |
| Venned | Paternal grandfather: NOT LISTED | Declaration of Due Diligence for: | | |
| Inventory | | a. Cidney Taylor (mother) – | | |
| PTC | Maternal grandparents: NOT LISTED | personal service required, | | |
| Not.Cred. | | unless diligence is found, | | |
| | Petitioner states the mom abuses drugs | Declaration of Due Diligence states that her current | | |
| Hrg | and alcohol and is homeless. Father is deceased. Petitioner states the | whereabouts are unknown | | |
| | children have been in her care since | b. Paternal grandfather – service | | |
| Aff.Pub. | 11/2013. | by mail sufficient | | |
| Sp.Ntc. | | c. Maternal grandparents – | | |
| | Court Investigator Jennifer Young filed a | service by mail sufficient | | |
| ✓ Conf. | report on 06/20/14. | | | |
| Screen | | | | |
| ✓ Letters | | | | |
| ✓ Duties/Supp | | | | |
| Objections | | | | |
| Video | | | | |
| Receipt | | | | |
| ✓ CI Report | | | | |
| 9202 | | | | |
| ✓ Order | | | | |
| Aff. Posting | | Reviewed by: JF | | |
| Status Rpt | | Reviewed on: 06/26/14 | | |
| ✓ UCCJEA | | Updates: | | |
| Citation | | Recommendation: | | |
| FTB Notice | | File 22 - Dixon | | |
| | | 00 | | |

Atty Vega, Robert (Pro Per – Petitioner – Brother)
Atty Vega, Juli (Pro Per – Petitioner – Sister-in-Law)

Petition for Appointment of Probate Conservator of the Person (Prob. C. 1820, 1821, 2680-2682)

| 1821, 2680-2682) | | | | | |
|------------------|-------------------------|-----|---|---|---|
| Ag | e: 75 | | NO TEMPORARY REQUESTED | NEEDS/PROBLEMS/COMMENTS: | |
| Co | nt. from | | ROBERT VEGA, brother, and JULI VEGA, sister-in-law, are petitioners and request appointment as Conservator of the Person with medical consent powers. | Court Investigator Advised Rights on 06/18/2014. Voting Rights Affected Need Minute Order. | |
| 1 | Verified | | Declaration of Taruna Nijhawan, M.D., filed | | |
| Ě | | | 05/13/2014 supports request for medical | 1. | Need Notice of Hearing. |
| - | Inventory PTC | | consent. | 2. | Need Proof of Conjugate the |
| | | | Voting Rights Affected | ۷. | Need Proof of Service of the Notice of Hearing with a copy |
| | Not.Cred. | ., | | | of the petition at least thirty (30) |
| | Notice of Hrg | X | Petitioners state : proposed Conservatee is 75 | | days prior to the hearing to |
| | | X | years old, has very limited ability to care for | | Central Valley Regional Center |
| | Aff.Pub. | - \ | herself, she is unable to manage everyday things such as cooking, cleaning, and | | per Probate Code §1822(e). |
| | Sp.Ntc. | | managing her personal hygiene. She cannot | 3. | #3 (a) or #3(b) of the Capacity |
| ✓ | Pers.Serv. | | drive and is unable to navigate a city bus line or call a cab and then pay the drive for the fare | 0. | Declaration was not answered |
| 1 | Conf. | | properly. She is unable to grocery shop for | | by the doctor as to whether he is a California Licensed |
| | Screen | | herself or make appointments for medical, | | Physician or a Religious |
| ✓ | Letters | | dental or eye exams and cannot keep a | | Practitioner. |
| ✓ | Duties/Supp | | calendar of important dates. Proposed conservatee has lived her entire life with her | 4. | #4 (a) was not answered as to |
| | Objections | | mother until the mother's passing in 1996 which | | when Dr. Nijhawan las t saw the |
| ✓ | Video | | she then moved in with her a sister-in-law until April of 2010. She has been in the care of the | | proposed conservatee. |
| | Receipt | | petitioners since 2010. She cannot live alone | _ | #4 ((a)) , , (c) a p at experience of eact a |
| ✓ | CI Report | | and needs constant supervision. | 5. | #4 (b) was not answered as to whether the proposed |
| | 9202 | | Count Investigation Company that Hamas was and | | conservatee is or is not a |
| | Order | X | Court Investigator Samantha Henson's report filed 06/25/2014. | | patient under his continuing treatment. |
| | | | | 6. | Need Order. |
| | Aff. Posting Status Rpt | | | Reviewed by: LV Reviewed on: 06/26/2014 | |
| | | | | | |
| | UCCJEA | | | _ | dates: |
| ✓ | Citation | | | Re | commendation: |
| | FTB Notice | | | File | e 23 - Vega |

24 Atty Atty

Bagdasarian, Gary G. (for Debbie Waltrip – Spouse – Petitioner) Rindlisbacher, Curtis D. (Court Appointed for Conservatee)

Petition for Appointment of Probate Conservator of the Person (Prob. C. 1820, 1821, 2680-2682)

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| | Aff.Sub.Wit. | |
| ✓ | Verified | |
| | Inventory | |
| | PTC | |
| | Not.Cred. | |
| | Notice of | Χ |
| | Hrg | |
| | Aff.Mail | Χ |
| | Aff.Pub. | |
| | Sp.Ntc. | |
| | Pers.Serv. | Χ |
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| √ | Letters | |
| ✓ | Duties/Supp | |
| | Objections | |
| ✓ | Video | |
| | Receipt | |
| ✓ | CI Report | |
| | 9202 | |
| ✓ | Order | |
| | Aff. Posting | |
| | Status Rpt | |
| | UCCJEA | |
| | Citation | Χ |
| | FTB Notice | |

TEMPORARY EXPIRES 6-30-14

DEBBIE WALTRIP, Wife, is Petitioner and requests appointment as Conservator of the Person with medical consent powers.

Capacity Declaration: Needed

Voting Rights Affected

Petitioner states the proposed Conservatee was essentially kidnapped by his daughters and taken to Oklahoma and is now listed as a missing person under suspicious circumstances. He is currently without all his daily medications. The people that have taken him are the same people who took him four years ago and were able to coerce him into removing money from his accounts including \$33,000 from his annuity fund. Petitioner requests to be excused from giving notice to the proposed conservatee's daughters.

Attached to the temp petition are the Petitioner's marriage certificate indicating that she and the proposed Conservatee have been married since 1989, and also Progress Notes from VA hospital indicating that the proposed Conservatee is under VA care for dementia, other conditions.

Court Investigator Julie Negrete's filed a report on 06/24/2014.

NEEDS/PROBLEMS/COMMENTS:

Court Investigator Advised Rights on 06/19/2014 by telephone.

Voting Rights Affected - Need Minute Order.

Note: Petitioner filed this petition for conservatorship of the person only in pro per; however, on 6-27-14, Petitioner filed an amended petition requesting conservatorship of the Person and Estate that is set for hearing on 8-7-14, along with a Petition for Temporary Conservatorship of the Estate, which is set for hearing on 7-10-14, through Attorney Gary Bagdasarian. However, no substitution has been filed.

Please note that although an amended petition has been filed, this hearing date will not be taken off calendar because the existing temporary is expiring.

SEE ADDITIONAL PAGES

Reviewed by: LV

Reviewed on: 06/26/2014

Updates: 06/27/2014 (skc)

Recommendation:

File 24 - Waltrip

24

NEEDS/PROBLEMS/COMMENTS:

As of 6-27-14, the following issues remain:

- 1. Need Capacity Declaration.
- 2. Need Citation.
- 3. Need proof of personal service of the citation and a copy of the petition on the proposed conservatee.
- 4. Need Notice of Hearing.
- 5. Petitioner lists only the proposed conservatee's two daughters that she alleges have taken him; however, according to the Court Investigator's report, the proposed Conservatee has other children also.
 - Therefore, need complete list of relatives within the 2nd degree pursuant to Probate Code §1821 (b).
- 6. Need Notice of Hearing.
- 7. Need proof of service of Notice of Hearing with a copy of the petition at least fifteen (15) court days prior to the hearing on all relatives pursuant to Probate Code § 1822.

William Cooley, Sr. (CONS/PE)

Atty Farmer, C. Michael (for Ruby Jones – Conservator)

Atty LeVan, Nancy J. (for I'lsha Cooley – Petitioner – Daughter)

Petition for Appointment of Temporary Conservatorship of the Person

| Age: 71 | | | | | | |
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| Cont. from | | | | | | |
| | Aff.Sub.Wit. | | | | | |
| √ | Verified | | | | | |
| | Inventory | | | | | |
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| > | Notice of Hrg | | | | | |
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| | Pers.Serv. | Х | | | | |
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| ✓ | Letters | | | | | |
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| | Objections | | | | | |
| | Video | | | | | |
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| | Citation FTB Notice | | | | | |
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25

GENERAL HEARING 07/29/2014

I'ISHA COOLEY, daughter, is petitioner and requests appointment as Temporary Conservator of the Person and the Estate without bond and with \$101,066.14 placed into a blocked account.

RUBY JONES, sister, was appointed conservator of the person and the estate on 03/25/2008. Ms. Jones passed away on 6/5/14 leaving a vacancy.

Estimated value of the estate:

Personal property - \$134,177.80 <u>Annual income</u>- \$23,037.71 **Total** - \$157,215.51

Petitioner states: the proposed conservatee suffered a traumatic brain injury and is unconscious and unable to care for himself or provide food, shelter and clothing for himself. Conservator, Ruby Jones, passed away on 06/05/2014. There is no one to make decisions for the proposed conservatee. Petitioner states she is willing and able to be his conservator.

Declaration of Attorney C. Michael Farmer filed 06/23/2014 declares that
Conservator, Ruby Jones, passed away
on June 5, 2014 and the office of
conservator is now vacant.

Court Investigator Charlotte Bien's report filed 06/18/2014.

NEEDS/PROBLEMS/COMMENTS:

Court Investigator Advised Rights on 06/17/2014.

- Need proof of personal service of Notice of Hearing with a copy of the temp petition at least five court days prior to the hearing on the proposed Conservatee pursuant to Probate Code §2250(e).
- 2. Probate Code§2320 states except as otherwise provided by statute, ever person appointed as conservator shall give a bond approved by the court. Therefore, bond should be set at \$62,000.00.

Note: If the petition is granted, status hearings will be set as follows:

• Tuesday, July 29, 2014 at 9:00 a.m. in Department 303, for the filing of receipt for blocked account.

Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior the date set the status hearing will come off calendar and no appearance will be required.

Note: A status hearing should also be set on Tuesday, July 29, 2014 for the filing of the final account of the former Conservator, Ruby Jones. Probate Code §2632(c) states that the court may compel the attorney for the deceased conservator to file an account of the deceased conservator. Therefore, if Michael Farmer is not in court the court should direct a copy of the minute order be mailed to him.

| Reviewed by: LV | | | | |
|---------------------------------|--|--|--|--|
| Reviewed on: 06/26/2014 | | | | |
| Updates: KT – on 6/27/14 | | | | |
| Recommendation: | | | | |
| File 25 - Cooley | | | | |

Lindsey Walton, Kenyata (Pro Per – Sister – Petitioner)

Petition for Appointment of Temporary Conservator of the Person (Prob

| Petition for Appointment of Temporary Conservator of the Person (Prob | | | | | |
|---|--|---|---|---|--|
| | | | GENERAL HEARING 7-22-14 | NEEDS/PROBLEMS/COMMENTS: | |
| | | | KENYATA LINDSEY WALTON , Sister, is Petitioner and requests appointment as Temporary Conservator of the Person. | Court Investigator advised rights on 6-25-14. 1. Need proof of personal service of Notice of Hearing | |
| > | Aff.Sub.Wit. Verified Inventory PTC Not.Cred. Notice of Hrg | | Petitioner states the proposed Conservatee has down syndrome. His current care provider is too sick to help him. Petitioner is his sister and can help with all his needs. Petitioner proposes to change the proposed conservatee's residence during temporary conservatorship to live with Petitioner. Petitioner filed an additional declaration on 6-26-14 that states even before everything with our grandmother happened, we'd pick up Maurice and he'd spend time with us. Petitioner's sister Monica usually takes him to get his hair cut, all the sisters would have him over for the night, take him to get his hygiene items and other daily things. It was in these visits that Petitioner and her sisters noticed that he wasn't living life to the fullest. He has never been in a day program, wasn't going out at all, and didn't have a healthy diet. Petitioner states they all came to the decision that she would be best fit to care for Maurice. Petitioner is motivated and caring, she is finishing a nurses' assistant program, and is going to college. When their grandmother became sick, Petitioner had him over more frequently. When she was diagnosed with terminal cancer, Maurice became more upset and agitated, and would cry frequently. Petitioner felt like it was a stressful environment for him. Petitioner states that Monique, who has power of attorney to their grandmother, suddenly refused to grant Petitioner or any of the sisters access to Maurice. He missed a niece's birthday party. This division is something their grandmother never would have wanted. SEE ADDITIONAL PAGES | with a copy of the Temporary Petition on the proposed Conservatee Maurice Jones at least five court days prior to the hearing pursuant to Probate Code §2250(e). 2. Petitioner does not list any other relatives at #11 of the petition. Need declaration listing all relatives of the proposed Conservatee to the 2nd degree. 3. Petitioner filed a Notice of Hearing on 6-20-14 listing four people that were personally served; however, the proof of service is incomplete and it does nto appear that a copy of the temp petition was served with the notice pursuant to Probate Code §2250(e). Also, it is unclear who the people listed are, because the relatives were not listed in the original petition. Note to Petitioner: Please remember that for the hearing on 7-22-14, CVRC will need to be served with Notice of Hearing in addition to family members. Probate Code §1822(e). Reviewed by: skc Reviewed on: 6-25-14 Updates: 6-27-14 Recommendation: | |
| > | Aff.Mail Aff.Pub. Sp.Ntc. Pers.Serv. | X | | | |
| > > > | Conf. Screen Letters Duties/Supp Objections Video Receipt CI Report | | | | |
| * | 9202 Order | | | | |
| | Aff. Posting Status Rpt UCCJEA Citation | | | | |
| | FTB Notice | | <u> </u> | File 26 - Jones | |
| | 26 | | | | |

26 Maurice Jones (CONS/P)

Case No. 14CEPR00511

Page 2

Petitioner states she plans to put Maurice in a day program, continuing his involvement with all his sisters lives and his family, outings, and a healthy diet and exercise. Most of the family supports this decision including some aunts and uncles, their mother, and all sisters, even family friends.

Court Investigator Jennifer Young filed a report on 6-27-14.